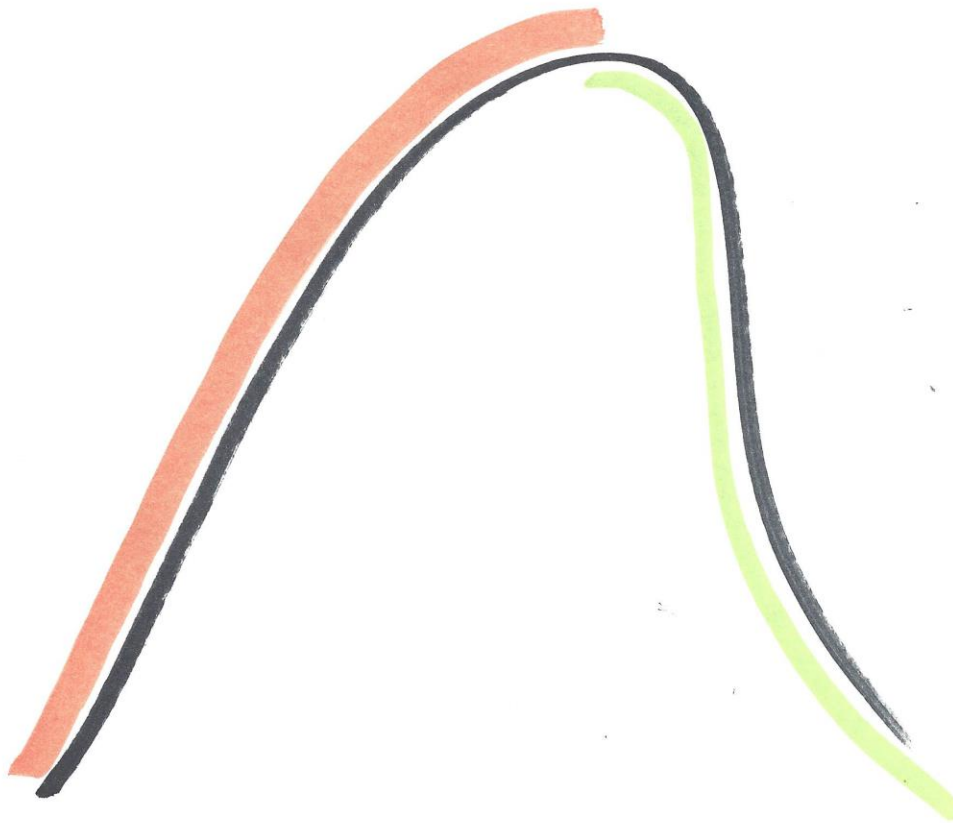


Workshop #1: Where's Your Financial Edge?

Instructor: Janet Fulton

Start off the Personal Finance Empowerment Series with tools, resources and a group coaching experience that helps you set your financial empowerment journey (and this workshop series) on a new success track. Discover your financial “edge”. Build confidence with clear and compelling goals. Learn conversation frameworks that promote discovery. And, sign up for a free personal financial coaching session at no charge.

Where's Your Financial "EDGE?"

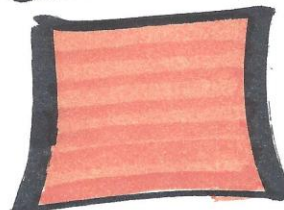
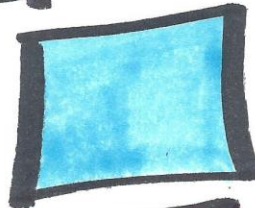
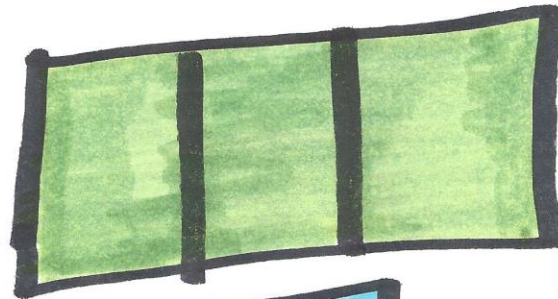
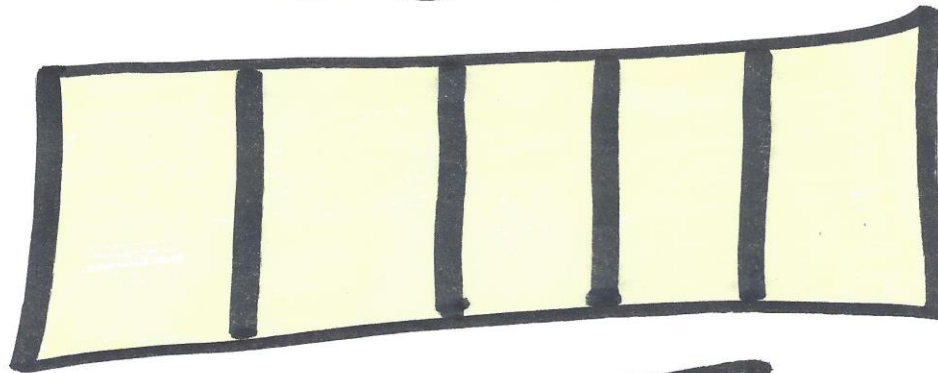


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WORDS

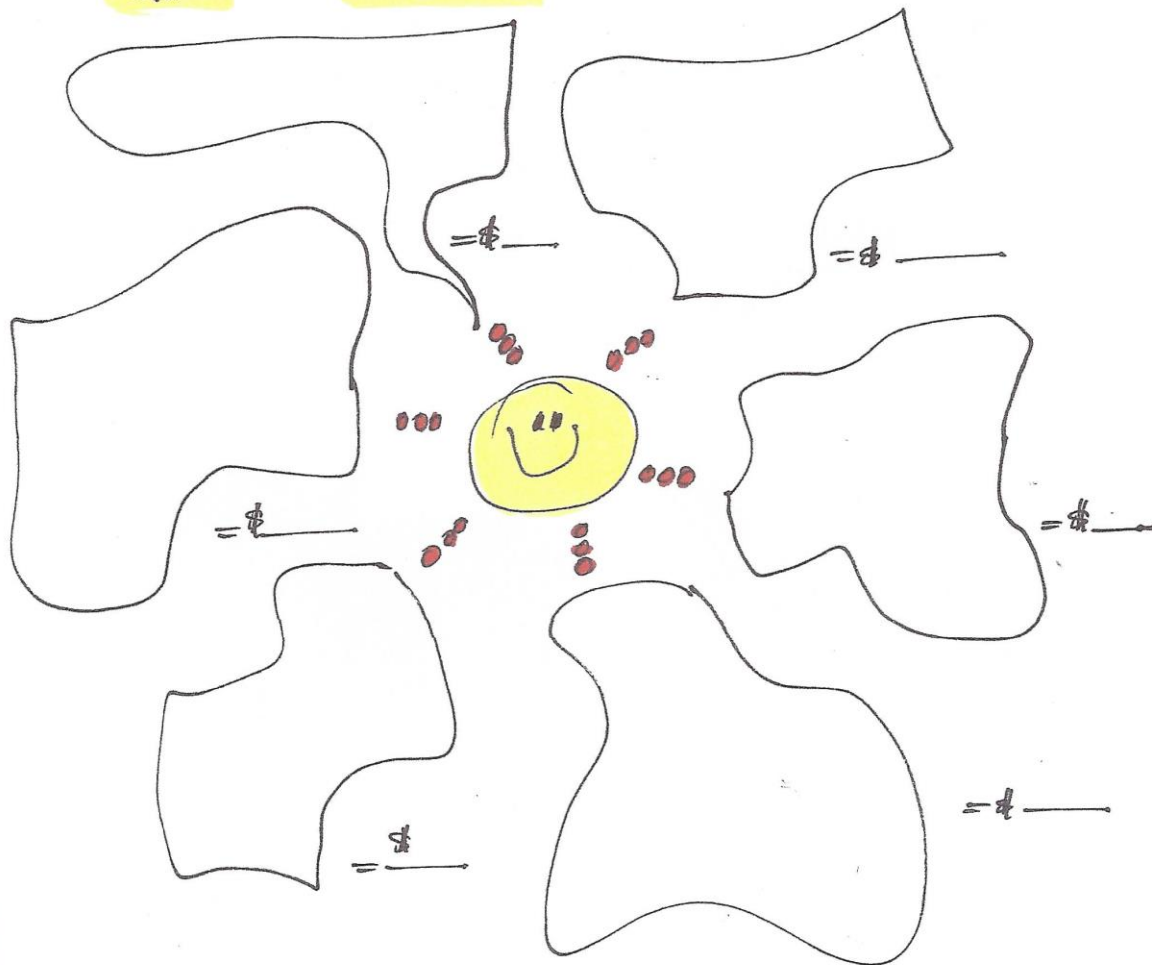
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Goal is the DRIVER



Area of Focus:

- FUN - What do I want to do for fun?
- FAMILY - What do I want to provide for my family?
- CAREER - What are my career goals?
- HEALTH - What do I want to do to improve my health?
- HOLIDAY - What spending plan will I follow?

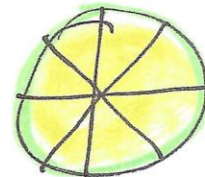
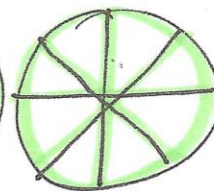
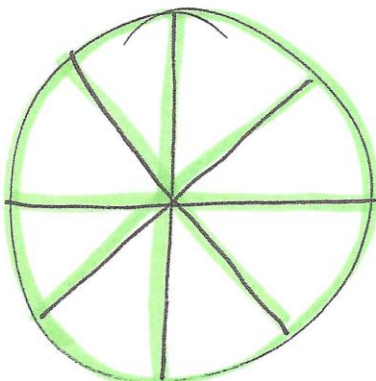
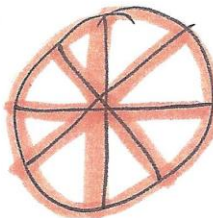
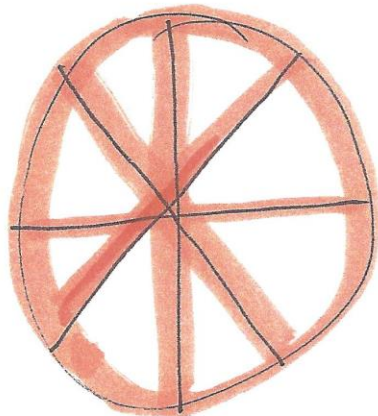
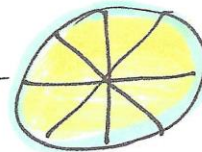
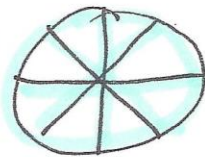
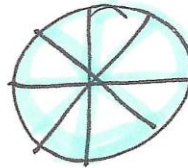
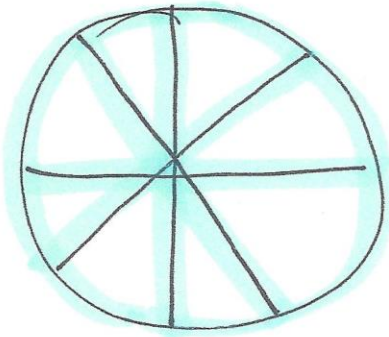


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Wheels **FORWARD** →

- Decide/List areas
- RATE level of satisfaction
- PRIORITIZE for Action
- TEST SMART!
- CREATE Action(s) steps
- TEST Barriers/Roadblocks
- Refine!
- Repeat!



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\$ TREATMENT PLANS

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GROW Model (Whitmore)

G	Goals Long-Term Short-Term
R	Reality The Current Reality The Current State
O	Options Courses of Action
W	The Way Forward What actions take place & when The Will to move toward the Goal

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Workshop #1 Follow-up

Take a few minutes after attending this workshop to think about what you learned and how you can apply this knowledge toward your financial goals.

1. Complete The Framework for Practical Preparation
 - List the skills and knowledge you need to be successful in:
 - a) financial management knowledge,
 - b) behavior to advance financial stability, and
 - c) confidence to achieve your financial goals.
 - Develop and record one to three goals for your 6 month, 1 year and 5 year financial goals in each category listed on the framework page.
2. Explore your 6 month goals using the “edge” framework.
3. Draw your 5 year goals on the “Goal Is The Driver” framework.
4. Experiment with different workshop frameworks.
5. Sign up for a personal financial coaching session.